

bpmonline

bpm'online release

7.12.4

09/03/2018



Simplify the future

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We at bpm'online are constantly working to deliver advanced capabilities to accelerate your sales, service, and marketing processes. Here are the new **features included in bpm'online version 7.12.4**.

The **update guide** is available [here](#).

Discover all of the **upcoming features** and improvements to our product range on the [upcoming releases page](#). Here are the new features included in bpm'online version 7.12.4:

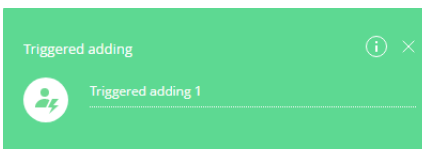
BPM'ONLINE MARKETING



CAMPAIGNS

- The new [Triggered adding] campaign element enables you to launch marketing campaigns when records are added or updated. For example, you can now set up a campaign that will send confirmation emails to new event participants immediately, upon their registration.

The new [Triggered adding] campaign element



Use element to instantly add a participant to campaign when new record that meets filter conditions is added or updated.
[Learn more](#)

Add participants when this object is added/updated

Lead

Which event should activate the trigger?

Record modified

Trigger activates when the following columns are modified: i

Need maturity

+ Add column

The modified record must meet filter conditions

Actions ▾

AND

<input checked="" type="checkbox"/> Need maturity	=	Sales-ready
+ Add condition		

BULK EMAILS

- Bpm'online now enables you to set up sending restrictions based on the email category (bulk or trigger emails) or type (newsletter, invitation, information, focus email, etc.). For example, you can set a limit of 2 newsletters per recipient a week. The restriction is configured in the

[Bulk email restriction rules] lookup. If a contact reaches the limit by at least one of the applicable restrictions, bpm'online will not send next scheduled email to that recipient. The response for the unsent email will be set to "Not sent (communication limit)".

Sending restriction for trigger emails of the "Newsletter" type

Name	Email type	Time period, days	Maximum sending
Дайджест новостей (триггерная рассылка)	Newsletter	7	2

BPM'ONLINE SALES

- You can now track the stage transition history of lead records in the [History] tab.

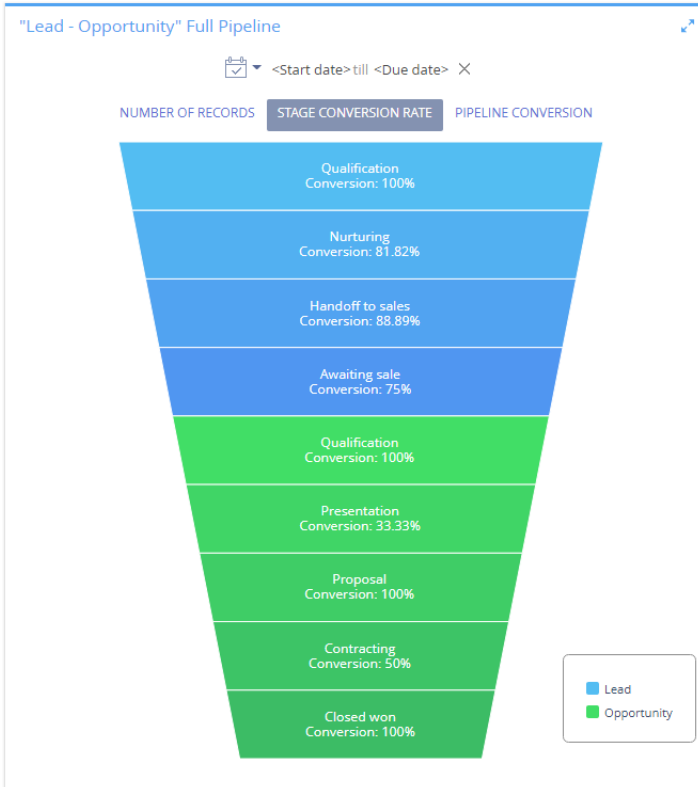


Lead stage transition history

Lead stage	Start	Due
Handoff to sales	8/16/2018 4:29 PM	
Nurturing	8/16/2018 4:29 PM	8/16/2018 4:29 PM
Qualification	8/16/2018 2:15 PM	8/16/2018 4:29 PM


- The new "Lead - Opportunity" pipeline dashboard enables you to get lead maturity insights by tracking lead conversion rates from initial interest to a closed deal. The pipeline includes information about leads and sales and can display the number of records, stage conversion rate and pipeline conversion.

The "Lead - Opportunity" pipeline dashboard



BPM'ONLINE SERVICE



- We have improved the  button, which is used to create a new case based on the text selected in a case history. The button is now displayed next to the selected text and will always remain on the screen.
- The issue that occurred on the configuration item page when attempting to configure the [Users] detail via the detail wizard was fixed.

CASE HISTORY






The case history has been reworked and improved, both on the self-service portal and in the [Processing] tab of the case page.

Case history on the self-service portal and in the [Processing] tab.

- All records are shown without a vertical scroll bar. Bigger emails are now collapsed. To display the full text of the email, you need to click the [Show more] button.

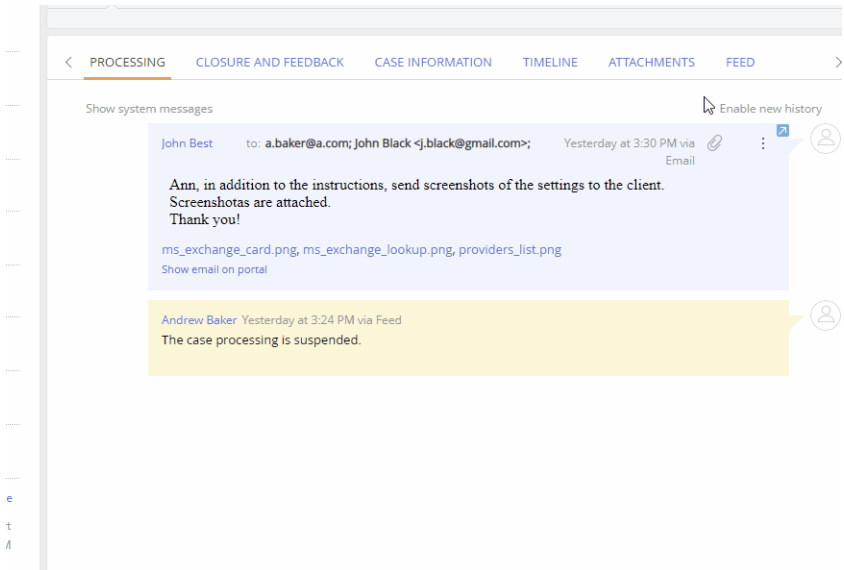
- You can now preview images attached to portal messages and emails. Image thumbnails are available for employees, while the portal users can quickly view any attached image by clicking it in the list of attachments. You can toggle between multiple images using the “Left” and “Right” keyboard button. Other attachments can be downloaded by clicking on the file name.
- The case history is grouped by months.

Case communication history

- The history displays attachments from portal messages and emails, as well as files added to the [Attachments] detail of the case. Click a file to download it.
- The [Reply] , [Reply all] , [Reply using template]  and [Forward]  buttons have been added to help you process emails more quickly.
- Comments to feed posts are also displayed in the case history.
- Email drafts, as well as hidden portal messages are grayed out.
- Click the recycle bin  button to delete email drafts.

Existing bpm’online customers can start using the new history view in the [Processing] tab by clicking [Enable new history]. The choice will be saved in the user profile. New customers will use the updated case history by default.

Case communication history

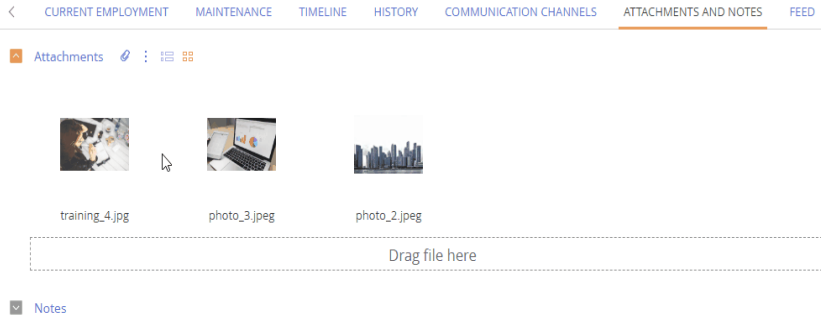


CORE FUNCTIONS

- You can now preview images in the [Attachments] detail using the tile view. Multiple images can be viewed by clicking the “Left” and “Right” buttons. Any file can be downloaded by clicking on its name.

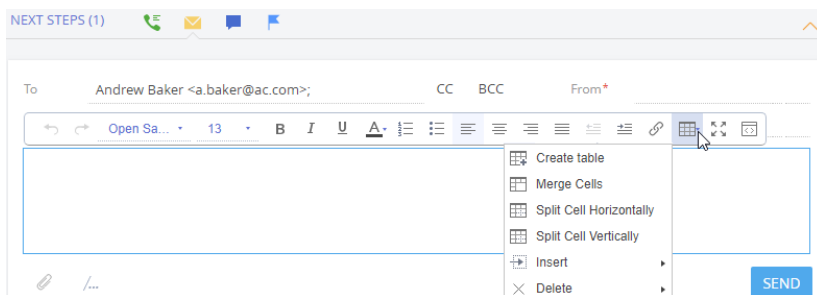


Image preview on the [Attachments] detail



- An error that occurred when posting a message in the feed via the action bar on the employee page was fixed.
- When configuring an aggregated feedback column and setting additional filter parameters, the column value is now calculated correctly.
- If you exceed the limit of 500 characters when populating a multiline text field of a mini page, bpm'online will warn you about this before saving the changes.
- If a file is too large to be added to the [Attachments] detail, bpm'online will warn you about this and display the maximum possible file size. If you have access to system settings, you can change the maximum file size limit directly in the error message.
- The formatting functionality of emails has been expanded in both [Emails] section and [Notes] tab. The following features have been added:
 - Undo or redo the last action.
 - Change the size of the added image.
 - Full-screen mode in the formatting area.
 - Use hot keys (Ctrl + K) to quickly create a link from the selected text (or picture).
 - Change link colors.
 - Increase or reduce paragraph indentation.
 - Create and format tables.

Working with tables in emails



WORKING WITH EMAILS

- Bpm'online will display suggestions when selecting email recipients. Start typing the recipient's or company name, and bpm'online will suggest recipients based on the entered text. Suggestions are displayed while creating an email via the action bar. Global search must be configured to use this functionality.

DUPLICATE SEARCH

- It is now possible to search for contacts and accounts of a lead for Oracle-based bpm'online configurations. If contact or account details are specified on the [Registration info] detail, bpm'online will suggest to connect the found record with the lead when you open the lead page. Searching for similar contacts and accounts is performed based on the pre-configured rules. Global search must be configured to use this functionality.

PREDICTIVE DATA ANALYSIS

- Machine learning model setup process has been improved. You can now create your own custom machine learning models without coding (i.e., write scripts).
- It is now possible to specify the rules, according to which the data will be selected for predictions. The time for prediction execution is determined based on the values of the [Maintenance periods] lookup.
- The new [Predict data] element has been added to the process designer. You can use the new element to set up business logic for predicting field values based on the machine learning models. You can select the machine learning model and the prediction conditions in the element properties.
- On the machine learning model page, it is now possible to select a column in which the prediction results will be saved.

The column for saving prediction results

Prediction of the assignees group

- We have improved how the current status of machine learning models is displayed. The [Training] tab automatically opens once you start the model training process. The data on the tab is updated automatically, without the need to refresh the page. The user who starts the model training process will receive a notification once the training process is complete.

INTEGRATIONS

- The process of sending emails from various places in bpm'online (mini page, section or detail list, contact or account page) is now more cohesive. A new bpm'online email page will open if you have a mailbox integrated with bpm'online. Otherwise, your default mail client (e.g., Outlook Express) will open.



WEB SERVICES


- It is now possible to perform OAuth 2.0 authentication for web services called from business processes. A system administrator can add shared application accounts that will be used for calling web services that support OAuth 2.0. The authorization works with OAuth 2.0 authorization code flow with systems that support transferring the "Client ID" and "Client secret" in the token request body.
- It is now possible to specify a system setting with the "Encrypted string" type as the default value in the text parameter of the web service method.
- Fixed an issue where the body parameter of the web service request with the "ID" type was displayed in the processes as a "Text" type parameter.

USER CUSTOMIZATION TOOLS

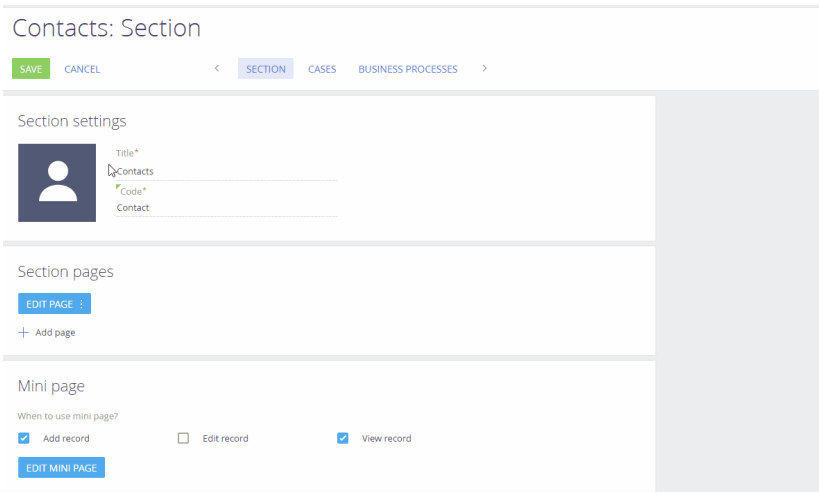
- An issue when business rules for displaying fields were incorrectly triggered on the details with the editable lists was fixed.
- Dashboards with a configured connection to a detail record page are now displayed correctly on the detail record page.



SECTION WIZARD

- When working with the section wizard, the page designer and mini page designer are now opened in separate windows. Each time you edit a different type of page, a new designer window opens. This way you can customize the page view, business rules and source code for each page separately. You can return to the section wizard by clicking the  button.

Accessing the page designer from the section wizard



ADMINISTRATION

- We added a new "Access to manage "System settings" system operation in the [Operation permissions] section. Previously, the access to system settings was configured in the "Access to workplace setup" system operation.
- In the [Calendars] lookup, the mini page remains open even if you click outside its borders. The horizontal scroll bar has been removed from the work calendars.



DEVELOPMENT TOOLS

- You can now display or hide a tab on the record page using development tools.

```
const usersTab = this.$TabsCollection.get("UsersTab");
usersTab.set("Visible", !this.$UseSharedUser);
```

- Implemented the ability to perform multi-line inserts in the database tables using a single command. This enables you to optimize the time for performing mass import operations in the database during integration, data transfer, etc. This functionality is available at the Insert class level and its operation is determined by the key Values() method. When you call the Values() method, all of the following Set() calls fall into a new ColumnsValues instance. When building a



query, if more than one data set is found in the ColumnsValuesCollection collection, a query will be constructed with several Values blocks.